



Filing ID #10021224

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Dr. Mark Green
Status: Congressional Candidate
State/District: TN07

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/20/2018
Period Covered: 01/01/2017– 04/30/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-----------------------|----------------|-------------------------------|---------------------------|
| A Night With Saddam published by Lulu Press [IP] | | \$1,001 - \$15,000 | Royalties | \$201 - \$1,000 | \$1 - \$200 |
| Alianz Master Dex F Fixed Annuity [FN] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| Align MD [OL] | | None | Capital Gains | \$1,000,001 - \$5,000,000 | \$1,000,001 - \$5,000,000 |
| LOCATION: Clarksville/Montgomery Co, TN, US DESCRIPTION: Sale of 100% Ownership in Align MD to APP Hold Co payments over 3 years ending Nov 2017. Current value of ownership is none and payments to me are complete as of NOV 2017. | | | | | |
| APP Hold Co [PS] | | None | Capital Gains | \$1,000,001 - \$5,000,000 | \$1,000,001 - \$5,000,000 |
| DESCRIPTION: Sale of stock in a privately held company. | | | | | |
| Authentically American Apparel [PS] | | \$100,001 - \$250,000 | Dividends | None | None |
| DESCRIPTION: Apparel company in Brentwood, TN. | | | | | |
| AXA Retirement Account ⇒ | | \$1,001 - \$15,000 | Tax-Deferred | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|---------------------|----------------|-------------------------------|-----------------------|
| AXA IRA Cash Account [IH] | | | | | |
| AXA Retirement Account ⇒ Consumer Discretionary Select Sector SPDR [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Ishares 10+ Year Credit Bond [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Ishares 1-3 Yr Credit Bond [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Ishares Core U S Aggregate Bond [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Ishares IBOXX \$Investment Grade Corp Bond [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Ishares MSCI France [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Ishares MSCI Germany [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Ishares MSCI Hong Kong [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Ishares MSCI Japan [EF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Ishares MSCI Switzerland Capped [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Ishares MSCI UTD Kingdom New [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Ishares Russell 1000 [EF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Ishares Russell 2000 [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Ishares U S Trust Short Maturity Bond | | \$1,001 - \$15,000 | Tax-Deferred | | |

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|---|-------|---------------------------|----------------|-------------------------------|-----------------------|
| [EF] | | | | | |
| AXA Retirement Account ⇒ Sector Consumer Staples Select Sector SPDR [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Sector Energy Select Sector SPDR [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Sector Healthcare Select Sector SPDR [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Sector Materials Select Sector SPDR ETF [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Sector Technology Select Sector SPDR [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Spdr Bloomberg Barclays Intl Treasury Bond [EF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| AXA Retirement Account ⇒ Vanguard Telecom Services ETF [EF] | | \$1 - \$1,000 | Tax-Deferred | | |
| Birch Creek Properties [RE] | | \$1,000,001 - \$5,000,000 | Interest, Rent | \$50,001 - \$100,000 | \$50,001 - \$100,000 |
| DESCRIPTION: Rental property in Clarksville, TN and Loans to others. | | | | | |
| Colo-Labs Research Company Medical Lab Tests [PS] | | \$50,001 - \$100,000 | Dividends | None | None |
| DESCRIPTION: Medical laboratory in Knoxville, TN. | | | | | |
| Dia-Tech Oncology [PS] | | \$15,001 - \$50,000 | Dividends | None | None |
| DESCRIPTION: Oncology services in Franklin, TN. | | | | | |
| ETFIS SER TR I Infracap Active MLP [EF] | | \$250,001 - \$500,000 | Dividends | None | None |
| Farm Horse Boarding Operation [FA] | | \$500,001 - \$1,000,000 | Rent | None | None |
| LOCATION: Ashland City, TN, US | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|-------|----------------------------|----------------|-------------------------------|-----------------------|
| DESCRIPTION: Horse boarding operation in Ashland City, TN. | | | | | |
| Franklin Conservative Allocation FD CL B [MF] | | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Gold [CO] | | \$1,001 - \$15,000 | Capital Gains | None | None |
| Hytch [DO] | | \$100,001 - \$250,000 | Interest | None | None |
| IRA Innovations Self Directed IRA ⇒ Cash Account [IH] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| IRA Innovations Self Directed IRA ⇒ Note Receivable from Westchester Properties [DO] | | \$100,001 - \$250,000 | Tax-Deferred | | |
| Loan to APP Hold Co [DO] | | \$5,000,001 - \$25,000,000 | Interest | None | None |
| Loan to Luke Stair [DO] | | \$15,001 - \$50,000 | Interest | \$1,001 - \$2,500 | \$1,001 - \$2,500 |
| Midland Fixed Annuity IRA [FN] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Northwestern Brokerage Investment Account Cash [BA] | | \$1,001 - \$15,000 | Dividends | \$201 - \$1,000 | \$201 - \$1,000 |
| Oppenheimer Steelpath MLP Income CL A [EF] | | \$1,000,001 - \$5,000,000 | Dividends | \$100,001 - \$1,000,000 | None |
| Rural Physician Partners PLLC [PS] | | \$250,001 - \$500,000 | Dividends | None | None |
| DESCRIPTION: Healthcare provider in Franklin, TN. | | | | | |
| Silver [CO] | | \$1,001 - \$15,000 | Capital Gains | None | None |
| State Farm Anuity [FN] | | \$250,001 - \$500,000 | Dividends | \$15,001 - \$50,000 | \$15,001 - \$50,000 |
| State of TN 401(k) ⇒ Allianz NFJ Large Cap Value Instl [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| State of TN 401(k) ⇒ Brown Capital Small Company Inv [MF] | | \$1 - \$1,000 | Tax-Deferred | | |

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|--|-------|-----------------------|----------------|-------------------------------|-----------------------|
| State of TN 401(k) ⇒ Columbia Mid Cap Value Instl [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| State of TN 401(k) ⇒ DFA International Value I [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| State of TN 401(k) ⇒ Fidelity International Discovery [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| State of TN 401(k) ⇒ Fidelity Puritan [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| State of TN 401(k) ⇒ Invesco Van Kampen Small Cap Value Y [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| State of TN 401(k) ⇒ Vanguard Institutional Index I [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| State of TN 401(k) ⇒ Vanguard Total Bond Market Index Inst [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| State of TN 401(k) ⇒ Voya Fixed Fund [MF] | | \$1 - \$1,000 | Tax-Deferred | | |
| State of TN 457 Plan ⇒ Alliance NFJ Large Cap Value Instl [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| State of TN 457 Plan ⇒ Brown Capital Small Company Inv [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| State of TN 457 Plan ⇒ Columbia Mid Cap Value Instl [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| State of TN 457 Plan ⇒ Fidelity International Discovery [MF] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| State of TN Consolidated Retirement System [FN] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Visible Pictures LLC Movie Production Loan [DO] | | \$100,001 - \$250,000 | Interest | None | None |

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|--|-------|-----------------------|----------------|-------------------------------|-----------------------|
| Westchester Properties [RE] | | \$250,001 - \$500,000 | Rent | \$5,001 - \$15,000 | \$5,001 - \$15,000 |
| DESCRIPTION: Rental properties in Nashville, TN. | | | | | |

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

| Source | Type | Amount Current Year to Filing | Amount Preceding Year |
|---|---------------|-------------------------------|-----------------------|
| State of Tennessee | Salary | \$45,627.00 | \$24,235.00 |
| American Physician Partners (APP Hold Co) | Salary | \$75,000.00 | \$275,000.00 |
| Crossfit Solafide | Spouse Salary | N/A | N/A |

SCHEDULE D: LIABILITIES

| Owner | Creditor | Date Incurred | Type | Amount of Liability |
|-------|----------|---------------|----------------|-------------------------|
| | F&M Bank | November 2017 | Personal loan. | \$500,001 - \$1,000,000 |

SCHEDULE E: POSITIONS

| Position | Name of Organization |
|--------------------------------|---|
| Division President | American Physician Partners |
| COMMENTS: Ended April 1, 2017. | |
| Director | Soldiers & Families Embraced |
| Director | Reboot for Recovery |
| President | Health Professions Insurance Company, LLC |
| President & CEO | Linden Risk Management LLC |
| President & CEO | 5 Stones Consulting |
| Chairman of the Board | Bunker Labs |
| Director | Boy Scouts of America |
| President | Two Rivers Medical Foundation |

| Position | Name of Organization |
|----------|----------------------|
|----------|----------------------|

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- AXA Retirement Account
- IRA Innovations Self Directed IRA
- State of TN 401(k)
- State of TN 457 Plan

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Dr. Mark Green , 05/20/2018